

Issue: When to Contact Data Management

Resolution:

- 1) Refer to [SOP: Claim Search CMS](#) in the Customer Service Knowledge Base.
- 2) You will land on the Contract page
 - a) Click on the **[Details]** tab.
 - b) Check the status and expiration date of the contract.
- 3) If status is expired or void, reach out to Data Management in Microsoft Teams.
 - a) Open Microsoft Teams and click on **[Teams]**
 - b) Click on **[Data Management]**
 - c) Provide the contract holders name, contract number, and status of the contract. Ask if the status is correct. - Follow hold procedures while waiting for a response.
- 4) Complete all necessary notes in CMS. Refer to SOP: Inputting Notes into CMS

Related References and Documents:

[SOP: Claims Number Search in CMS](#)

SOP: Inputting Notes into CMS

Purpose

This SOP is intended to outline when to reach out to Data Management. This applies to Month to Month (M2M) contracts only.

Teams Impacted

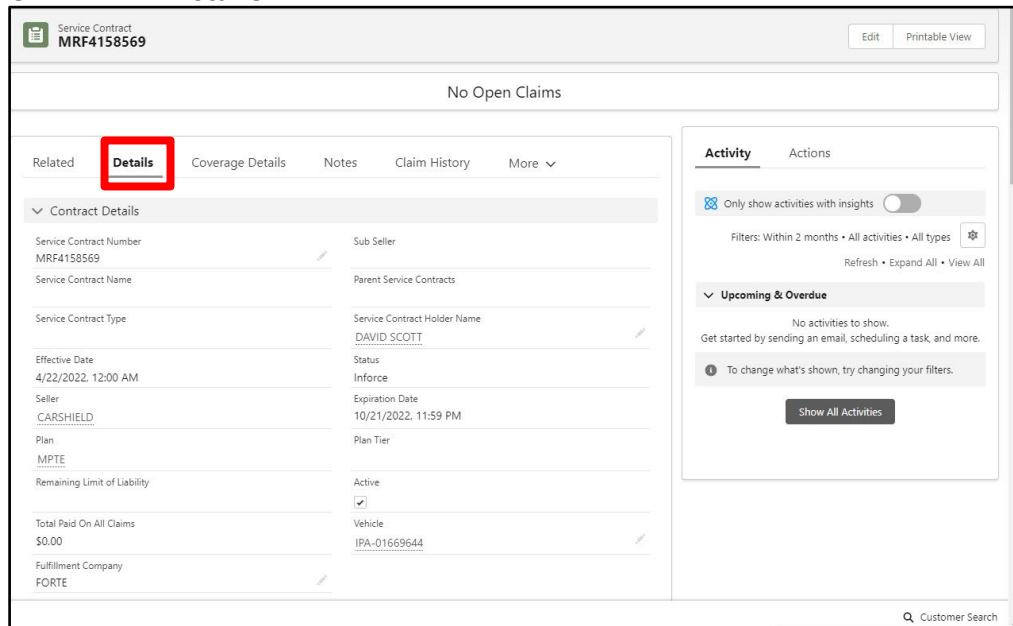
- All Departments

Procedure

1. Refer to SOP: "Claim Search CMS" in the Customer Service Knowledge Base.

2. You will land on the Contract page.

a. Click on the **Details** tab.



Service Contract MRF4158569

No Open Claims

Related **Details** Coverage Details Notes Claim History More ▾

Contract Details

Service Contract Number: MRF4158569

Service Contract Name: [Redacted]

Service Contract Type: [Redacted]

Effective Date: 4/22/2022, 12:00 AM

Seller: CARSHIELD

Plan: MPTE

Remaining Limit of Liability: [Redacted]

Total Paid On All Claims: \$0.00

Fulfillment Company: FORTE

Sub Seller: [Redacted]

Parent Service Contracts: [Redacted]

Service Contract Holder Name: DAVID SCOTT

Status: Inforce

Expiration Date: 10/21/2022, 11:59 PM

Plan Tier: [Redacted]

Active: ☒

Vehicle: IPA-01669644

Activity Actions

Only show activities with insights ☐

Filters: Within 2 months • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

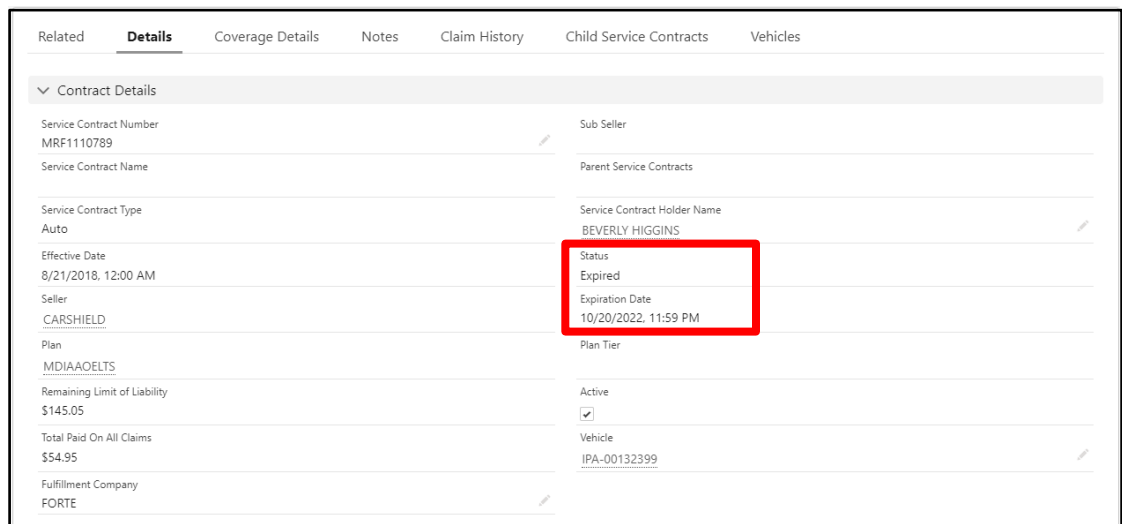
No activities to show. Get started by sending an email, scheduling a task, and more.

To change what's shown, try changing your filters.

Show All Activities

Customer Search

b. Check the status and expiration date of the contract.



Related **Details** Coverage Details Notes Claim History Child Service Contracts Vehicles

Contract Details

Service Contract Number: MRF1110789

Service Contract Name: [Redacted]

Service Contract Type: Auto

Effective Date: 8/21/2018, 12:00 AM

Seller: CARSHIELD

Plan: MDIAAOLTS

Remaining Limit of Liability: \$145.05

Total Paid On All Claims: \$54.95

Fulfillment Company: FORTE

Sub Seller: [Redacted]

Parent Service Contracts: [Redacted]

Service Contract Holder Name: BEVERLY HIGGINS

Status: Expired

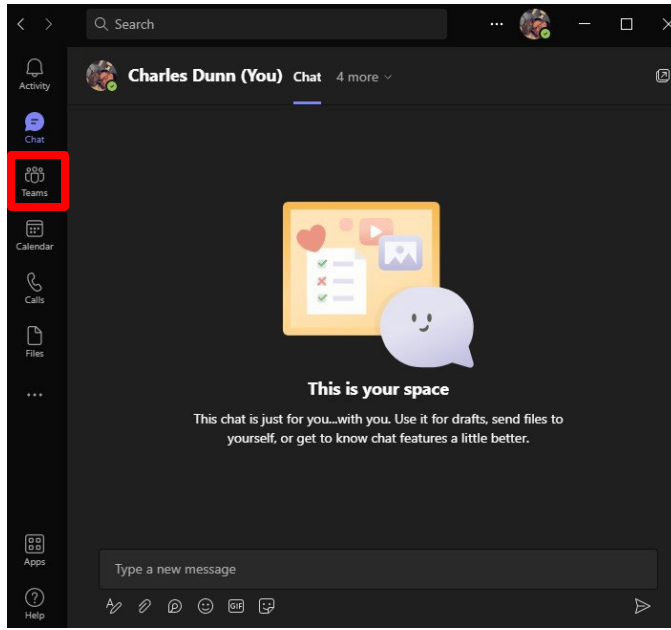
Expiration Date: 10/20/2022, 11:59 PM

Plan Tier: [Redacted]

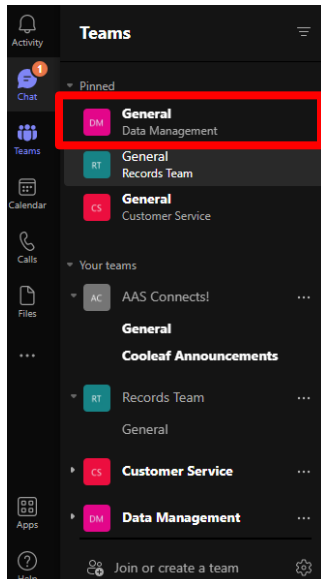
Active: ☒

Vehicle: IPA-00132399

3. If status is expired or void, reach out to Data Management in Microsoft Teams.
 - a. Click on **Teams**.



- b. Click on **Data Management**.



- c. Provide the contract holders name, contract number, and status of the contract. Ask if the status is correct.

Reminder: Be patient when waiting for a response. Remember to follow hold procedures while you are waiting on a reply.

4. Complete all necessary notes in CMS. Refer to Notating in CMS 20220301.

Approval & Revision

Date Created 10/17/2022	Created By Charles Dunn	Date Approved 11/08/2022	Approved By Felicia Mainiero / Brian Coleman	
Date Revised 08/02/2023	Revised by Melissa Bryant	Revision Description Added Fast Track Article	Date Approved 08/02/2023	Approved By Amanda Wiseman
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]